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FRANCE'S FISHING INDUSTRY, 1963 1/

SUMMARY

Although the landed tonnages of the French fishing industry remained about the same for 1963 as for 1962, the value of the industry's 1963 production reached a record of over one billion francs. In light of France's favorable geographical conditions for fishing and the possibility of increasing the country's consumption of fish products, the stability of the 1963 catch brought into sharp focus the two major problems facing the industry, namely, the limited domestic consumption of fish and the keen competition by foreign industries for the market that exists. These problems have prompted the French Government to set up a far-reaching plan of aid to the various sectors of the fishing industry and to confirm, at the Western European Fisheries Conference, held in London in December of last year, its intention to protect its fishing industry until the modernization and expansion deemed essential is achieved. Under these conditions, although the total tonnage of imports from the U.S. doubled in 1963 over 1962, the proportion of these imports to total French fish imports remains quite small and the potential for further expansion of American exports of fish and fish products to France remains moderate.

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The total production of the French fishing industry for 1963 was about 600,000 tons, consisting of 445,000 tons of fish, 136,000 tons of shellfish and 17,000 tons of crustaceans. The fleet responsible for most of this catch, valued at over one billion francs 1/, is made up of about 15,000 ships (totalling 262,000 tons) with a total crew of about 45,000 fishermen. As the annual volume of business involved in the smoking, salting, canning, freezing and selling of this catch averages about two billion francs, the industry provides employment for thousands of other land based workers, including about 30,000 ship-owners, retailers, and fish-mongers.

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French fishing is practiced on both the industrial level (in ships ranging from 1000 to 2000 tons) and the handicraft level (in ships of less than 250 tons). Industrial fishing is conducted on the distant banks of Greenland and Newfoundland, which produced 125,000 tons of fish in 1963, and on the high seas of the northern Atlantic and the North Sea, which produced about 225,000 tons. Handicraft fishing is practiced on the high seas of the eastern Atlantic, the North Sea, the Mediterranean and the African coast and in France's coastal waters. Production from high sea handicraft fishing was about 133,000 tons in 1963 while that of coastal fishing amounted to about 37,000 tons. A noteworthy feature of the industry is the wide variety of species it supplies: cod, mackerel, whiting, hake or pallock, herring, sardines, ray, sole, tuna, sprats and anchovies, etc...

The National Congress of Fisheries held in Paris in early 1964 concerned itself primarily with the discussion of two questions, namely, means for increasing the French consumption of fish products and the increase of foreign competition for the French market.

The French consumption of fish is one of the lowest in Europe. Each French consumer eats an average of only 24.6 pounds of fish, crustaceans and shell-fish per year (against 176 pounds of meat), whereas the average consumption in the other European countries is 35 pounds (the Japanese eat as much fish each month as the French do in one year). By increasing the consumption of fish, it is hoped that the heavy demand for meat can be reduced, thus aiding the Government's fight against the sharp increases in meat prices in recent years.

To increase consumption, however, it is first necessary to encourage producers to increase their investment and consequently their production. Many producers are reluctant to invest in new equipment, stating that modernization does not necessarily involve an increase of production as resources of fish are diminishing. Furthermore, according to many wholesalers, much of the fishing fleet is in the hands of small family type enterprises which do not have financial ties with other companies and so must make investments out of their own resources. The reorganization of such a structure to increase production involves social as well as economic problems.

An increase of consumption will also mean an increase of competition from foreign suppliers. This competition has already been stimulated by the reduction in customs duties within the Common Market and French producers are concerned about increasing their investments and then being faced with even keener competition.

Realizing that the reorganization of the fishing industry cannot be carried out without its assistance the Government has undertaken an energetic policy of aid. It has set up a five-year plan which aims at encouraging fish consumption through the application of a policy of quality control at all the levels of production, transportation and distribution. Aid is to be given for technical research and professional training. Strict regulations have been established for trawling to prevent the exhaustion of the coastal fishing zones. Financial assistance

will be granted for shipbuilding and related investments, such as modernization through the use of new techniques for preparing and freezing the fish. (This will require the introduction of a credit system similar to ones made available to foreign competitors by their governments). Attempts will be made to better organize the profession and the market by increasing the number of selling points, regulating trading conditions, creating a national catalog (nomenclature) of fish products, and constructing canning plants and other conservation facilities (warehouses, freezing, tunnels, etc.) on the Mediterranean coast to handle the sharp increase of sardine production in this area (see below - Coastal Fishing).

At the Western European Fisheries Conference held in London from December 1963 to February 1964, France joined Italy in supporting the maintenance of a certain protection against imports, as the fishing industries of both would not be able to meet the lower prices of foreign competitors without import duties. Great Britain, the Netherlands and Germany desirous of increasing their exports of frozen fish, supported a liberal trade policy. (The French are so concerned with the threat of foreign competition to the fish industry that the Minister of Public Works and Transportation has stated that France will ask her EEC partners for a harmonization of the competition among member countries and will insist upon a protection against imports from non-members.)

Of the four resolutions adopted at the London Conference on: 1) the rational exploitation of fish resources, 2) a future conference on a fisheries "police", 3) the request to the Governments to adopt a liberal policy for fish trade, 4) fishing limits, the resolution on the latter subject has already been approved by the French Government. It extends the fishing limits from 3 to 6 miles, and from 6 to 12 miles, subject to concessions to countries with historic fishing rights in the area in question.

PRODUCTION

French production of fish, crustaceans and shell fish in 1963 was at about the same level as in 1962. The industry is very diversified and the decreases that were experienced in some sectors (e.g. salted codfish and crustaceans) were compensated for by increases in other sectors (e.g. herring, mackerel and whiting). As the average prices for fish also remained relatively stable in 1963, contrary to the sharp rise in prices in 1962, the total value of production increased only slightly. However, this slight increase was sufficient to enable the total value of France's output of sea products in 1963 to exceed one billion francs, the first time this figure has been achieved.

The production of cod liver oil and fish meal continued to decrease, with imports supplying a good portion of French needs. The production of canned fish decreased slightly.

An overall picture of the recent production of the French fishing industry will be found in the following comparative table:

	Quantity (Thousands of Metric Tons)			Value (Millions of Francs)		
	1961	1962	1963	1961	1962	1963
Fish (coastal) (fresh	376.5	373.9	382.3	545.8	604.5	615.7
(frozen	8.9	10.3	14.9	12.4	14.5	25.2
Codfish (high sea) (salted	57.8	61.0	44.6	62.2	70.1	57.9
(frozen	.4	.5	.9	.6	.9	1.6
TOTAL FISH	443.6	445.7	442.7	621.0	690.0	700.4
Crustaceans (fresh	18.6	18.5	17.0	71.4	79.7	80.1
(frozen	.8	.5	.2	8.6	6.2	4.0
TOTAL CRUSTACEANS	19.4	19.0	17.2	80.0	85.9	84.1
Shell-fish (from open ground	23.2	27.7	25.9	22.5	27.6	26.5
(from breeding beds	96.0	108.0	110.0	157.0	184.0	205.7
TOTAL SHELL-FISH	119.2	135.7	135.9	179.5	211.6	232.2
GRAND TOTAL	582.2	600.4	595.8	880.5	987.5	1,016.7
Fish oil (Codfish oil)	2.2	1.9	1.2	n.a.	1.1	1.2
Fish meal	13.5	14.0	8.0	n.a.	n.a.	n.a.
Canned fish (Tonnage canned)	n.a.	90.1	89.5	n.a.	n.a.	n.a.

I. FISH - (COASTAL FISHING).

The catch of fresh fish by the French coastal fishing fleet in 1963 - 382,300 tons worth 615.7 million francs - increased by 8,400 tons in quantity and by 11.2 million francs in value, compared with 1962. The additional 14,900 tons of fish (worth 25.2 million francs) which were frozen also represents an increase, by 4,600 tons in quantity and by 10.7 million francs in value, compared with 1962. In quantity as well as in value, the French production of fresh fish in 1963 was the highest ever reached by the French fishing fleet.

The 1963 increase in production is due to larger catches in the North Sea area and in the Mediterranean. In the North Sea and the English Channel, the increase amounted to about 5,300 tons, or 3.3% over 1962. This was due in major part to the Port of Boulogne's production of 118,254 tons, which represented about 71% of the North Sea area's total production of 166,965 tons, and which was 7.2% more than the Port's 1962 production. The species caught in larger quantities were whiting, haddock, and especially herring and coalfish, the tonnages of which were particularly remarkable. The catch's total value of 137.1 million francs was the highest ever reached in Boulogne.

In the Mediterranean, the increase amounted to about 5,500 tons (for a total production of 21,056 tons) or approximately 34% over 1962. The corresponding value increased in about the same proportions: from 38 million francs in 1962 to 50.4 million francs in 1963, or 32.5%.

The expansion of the Mediterranean production was due in major part to the catch of sardines, which augmented by 4,000 tons, or 60% over 1962. The cause of this considerable rise was the authorization given by the French Government in 1961 to practice "lamparo" fishing*. This method immediately bore fruit: the tonnages of sardines landed in the area has augmented considerably and Marseilles has become first among French sardine ports. In addition, the sardine fishing fleet has been increased by the repatriated Algerian fishermen.

Catches of other species such as tuna, mackerel and anchovies, also contributed to the Metiterranean production increase (these species increased from 7,142 tons in 1962 to 9,022 tons in 1963, i.e. 26.5%). The Mediterranean production thus represented in 1963 a 100% increase compared with the "normal level" of the years preceding 1961. The following figures give a picture of the expansion of the Mediterranean production:

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* Utilization of a light source to attract the fish.

	1959	1960	1961	1962	1963
Quantities in metric tons	9,610	11,005	16,367	15,465	21,056
Value in million francs	29.68	31.93	42.52	38.06	50.43
Average price in francs per kilogram	3.09	2.82	2.60	2.46	2.39

The production increase in Brittany was 1,100 tons and that of the landings in Africa 497 tons. It was only on the Atlantic coast that the catch decreased (by 4,000 tons).

The following table gives a comparative breakdown of the French production of fresh fish over the past three years (in metric tons):

	1961	1962	1963	Difference 1963/62
SEASONAL SPECIES:				
Herring (salted	332	356	318	- 36
(fresh	36,603	29,453	33,116	+ 3,663
Mackerel	42,492	35,634	37,769	+ 2,135
Sardine	22,472	31,739	26,129	- 5,610
Tuna (landed in France	16,590	19,349	15,273	- 4,076
(landed in Africa	9,900	10,300	10,797	+ 497
Sprat & Anchovies	1,494	1,266	1,471	+ 205
TOTAL SEASONAL SPECIES	129,883	128,097	124,873	- 3,224
OTHER SPECIES:				
Hake or pollock	34,255	31,650	28,006	- 3,644
Whiting	30,578	30,990	36,268	+ 5,278
Sole	2,222	1,817	2,083	+ 266
Miscellaneous	179,531	181,336	191,037	+ 9,701
TOTAL OTHER SPECIES	246,587	245,793	257,394	+ 11,601
GRAND TOTAL FRESH FISH	376,470	373,890	382,267	+ 8,377

The 14,833 tons of fish which were frozen consisted of 11,108 tons of tuna and 3,775 tons of sardines.

The general average price of fish decreased from 1.62 francs per kilogram in 1962 to 1.61 francs in 1963. Average 1962 and 1963 prices, per kilogram, for each of the various species were as follows:

	Francs 1962	Francs 1963	Percentage of Change 1963/1962
Herring	1.03	0.80	- 22%
Mackerel	0.88	1.09	+ 23.8%
Sardine	1.47	1.52	+ 3.4%
Tuna (White	3.06	3.06	0.0%
(Red	4.00	4.49	+ 12.2%
Whiting	1.05	0.98	- 6.7%
Hake or pollack	3.07	3.66	+ 19.2%
Sole	6.00	6.37	+ 6.1%
Misc. "Other Species"	1.71	1.72	+ 0.6%

II. CODFISH - (HIGH SEA FISHING)

The landings of salted codfish which had been constantly increasing over the last few years, decreased sharply from 60,923 tons in 1962 to 44,642 tons in 1963, or a difference of 16,281 tons, representing about 26.7% of the 1962 production. The value of this catch fell from 70.1 million francs in 1962 to 57.9 million francs in 1963, a decrease of 12.2 million francs. Under such conditions of shortage, the average price of salted codfish rose in 1963 to 1.19 franc per kilogram, compared with 1.13 franc in 1962, an increase of about 5.3%. A total of 863 tons of frozen codfish valued at 1,620,000 francs were also produced compared with 554 tons valued at 942,000 francs in 1962. The average price of frozen codfish in 1963 was 1.87 francs per kilogram. For the French, high sea fishing covers codfish only.

III. CRUSTACEANS

The 1963 production of crustaceans amounted to 17,200 tons, valued at 84.1 million francs. These figures are lower than those of 1962 by 9.5% for the tonnages and by about 2% for the value. The two sectors which are particularly important are (1) lobsters and spiny lobsters, which in 1963 represented 11.9% of the total tonnage and 44.3% of the total value of French crustacean production, and (2) Norway lobsters ("Langoustines")

which represented 48.5% of the total tonnage and 33% of the total value.

The shortage of lobsters and spiny lobsters, which the industry had experienced several years ago, was being remedied by the research for and discovery of new fishing grounds, such as the waters off the Banc d'Arguin (Saharan coast of Mauritania), rich in pink spiny lobsters, and the waters off the northeast coast of Brazil and off the Honduras coast. However, the resources of the Banc d'Arguin waters are now fairly exhausted; as for the Brazilian and Honduran waters, the recent claims of the coastal countries prevented the French fishermen from making use of these waters after March 1963.

The catch of live green, pink and grey spiny lobsters consequently dropped from 1,364 tons in 1962 to 1,261 tons in 1963. The decrease became considerable for the frozen spiny lobsters, which dropped from 839 tons in 1961 to 497 tons in 1962 and 244 tons in 1963. This decrease was also due to the change in the activity of the fishermen whose profit is better on live spiny lobsters than on frozen tails, and who consequently have given up the production of the latter item. The catch of red spiny lobsters and lobsters is also decreasing (as are the catches of crabs and of miscellaneous crustaceans) and French fishing circles state that with the new off-shore fishing limits which will soon be applied, they will have to count on their own resources alone, which at present can meet only a comparatively small portion of the French market.

Norway lobsters are very much appreciated by the French consumers. The very large increase of their production (which amounted to 8,377 tons in 1963, a 26% increase over 1962, and which valued 28.1 million francs, 25% more than in 1962) and the increase of the shrimp production partly compensated for the above-mentioned decrease in the production of the other crustaceans.

There follows a breakdown, by species, of crustacean production over the last three years, as well as an indication of the average prices effective in 1963:

	Quantity (Metric Tons)			Average per Kg price (Francs)	
	1961	1962	1963	1962	1963
Spiny lobster Red	720	699	498	18.50	21.20
" " Green	228	190.5	117	15.20	15.84
" " Pink	990	1,174	1,144	12.20	13.95
Total spiny lobster	1,938	2,063.5	1,759	14.62	16.10
Lobster	396	405	292	15.50	16.40
Total spiny lobster & lobster	2,334	2,468.5	2,051	14.75	16.16

(cont'd)	Quantity (Metric Tons) 1961	1962	1963	Average price per Kg (Francs) 1962	1963
Norway lobster ("langoustine")	8,168	6,665	8,377	3.40	3.36
Gray shrimp	n.a.	1,326	1,533	3.92	3.96
Pink shrimp	471	361	223	13.40	18.63
Crab	4,939	5,560	3,551	1.22	1.52
Misc. crustaceans	n.a.	2,143	1,219	1.83	n.a.
Total Fresh Crustaceans		18,523.5	16,954	4.30	4.72
Frozen spiny lobster tails	839	497	244	12.30	16.27
Frozen shrimp	None	7	10	7.30	n.a.
GRAND TOTAL (YEAR)	19,413	19,027.5	17,208	4.50	4.88

IV. SHELL-FISH

The total production of shell-fish caught in open waters and shell-fish obtained from breeding-beds amounted to 135,910 tons valued at 232,450,000 francs in 1963, compared with 135,698 tons valued at 211,603,000 francs in 1962.

A) Shell-fish from open grounds

The following table indicated production by species, as well as the value:

	Quantities in metric tons 1961	1962	1963	Value in thousand francs 1962	1963
Scallops	5,450	5,723	5,785	7,418	9,165
Mussels	2,285	7,279	8,420	3,486	3,860
"Petoncle" Scallops	1,205	1,470	825	1,920	1,320
"Praires"	830	621	475	657	595
Oysters	535	1,235	895	2,474	1,425
Misc. shell-fish	12,905	11,370	9,510	11,648	10,085
TOTAL SHELL-FISH from open grounds	23,210	27,698	25,910	27,603	26,450

The 1963 production of shell-fish from open grounds is, according to the table, somewhat lower than in 1962 (25,910 tons compared with 27,700 tons). However, it must be noted that production figures in the matter

of shell-fish are not as accurate as those for fish. This may explain why the item "miscellaneous" is fairly large in proportion to the others; the item "miscellaneous" also includes sea-urchins.

B) Shell-fish obtained from breeding-beds

Given below is the breakdown (production and value) for the two species which are obtained from breeding beds:

	Quantities in metric tons			Value in thousand francs		
	1961	1962	1963	1961	1962	1963
Oysters flat	11,000	13,000	11,000	48,000	56,000	57,000
Oysters "Portuguese"	55,000	60,000	58,000	88,000	100,000	116,000
Total Oysters	66,000	73,000	69,000	136,000	156,000	173,000
Mussels	30,000	35,000	41,000	21,000	28,000	33,000
TOTAL SHELL-FISH from breeding beds	96,000	108,000	110,000	157,000	184,000	206,000

The tonnage of oysters from breeding-beds which were sold in 1963 is 5.5% lower than in 1962. The efforts made to develop mussels breeding continued to be fruitful, as indicated by the tables. As a whole, the tonnage of oysters and mussels from breeding-beds sold in 1963 exceeded not only the figure of 1962, but also that of 1956 which had been the previous high (109,000 tons).

V. FISH OIL

Production of codfish oil, which was 1,950 tons in 1962, dropped to 1,188 tons in 1963. The continuous decrease of this production in past years, a decrease which has averaged 200 or 300 tons per year, was accentuated in 1963, amounting to 764 tons. In contrast, the average price almost doubled (from 0.55 franc to 1.02 franc per kilogram), which explains the increase of the value of the production from 1,075,000 francs in 1962 to 1,220,000 francs in 1963. There are no statistics available on the other types of fish oils produced in France, but their tonnages are said to be insignificant. French needs for fish oil are met by imports, which in 1963 were 25 times the amount of domestic production.

VI. FISH MEAL

According to the trade association "Syndicat des Farines de Poisson", the production of fishmeal, which is all concentrated in the port of Fécamp between Le Havre and Dieppe on the English Channel, decreased from 14,000

tons in 1962 to 8,000 tons in 1963. France imported in 1963 about 9 times more fishmeal than it produced. The average price of fishmeal per kilogram was the same in 1963 as in 1962, 0.70 franc.

VII. CANNED FISH, CRUSTACEANS AND SHELL-FISH

The following table gives a breakdown by species of the various fish products which were canned in France in 1962 and 1963.

	Number of Cans		Quantity of Fish used (Metric Tons)	
	1962	1963	1962	1963
Sardines (21 Kg per 100 cans)	142,850,000	95,250,000	30,000	20,000
Tuna (23 Kg of white or red Tuna, or 26 Kg of Albacore per 100 cans)	109,800,000	108,700,000	26,400	26,500
Mackerel (24 Kg per 100 cans)	71,770,000	95,800,000	17,200	23,000
Herring (23 Kg per 100 cans)	8,700,000	21,700,000	2,000	5,000
Sprats and Anchovies (17 Kg per 100 cans)	8,800,000	5,880,000	1,500	1,000
Other Fish (30 Kg per 100 cans)	33,300,000	40,000,000	10,000	12,000
Crustaceans and Shell-fish (30 Kg per 100 cans)	10,000,000	6,670,000	3,000	2,000
TOTAL	385,220,000	374,000,000	90,100	89,500

FOREIGN TRADE

Foreign trade statistics for 1963 show that total French imports increased while total exports decreased. The French production having remained stable, these opposite trends resulted in more abundant supplies on the French market compared with 1962 and in a larger French consumption. However, as satisfactory as this result may be from the viewpoint of consumption, the increase of imports and the decrease of exports are disquieting factors in French fishing circles.

I. IMPORTS

A. Fish, Crustaceans and Shell-fish. French imports of these products increased from 134,178 tons worth 234,586,000 francs in 1962 to 144,918 tons worth 287,357,000 francs in 1963.

The U.S. participation, although small in proportion to the total, doubled compared with last year, from 379 tons worth 2,587,000 francs

in 1962 to 788 tons worth 4,979,000 francs in 1963. The U.S. items included: 611 tons of salmon compared with 272 tons in 1962; 155 tons of "other molluscs and shell-fish" compared with 26 tons in 1962; and for the first time, 22 tons of crabs and crayfish, reportedly mainly frozen king crabs from Alaska.

France's major supplier of salmon was Canada (1,761 tons), of "other molluscs and shell-fish" Ireland (1,943 tons), and of crabs and crayfish, Turkey (145 tons) and Italy (71 tons).

B. Fish-Oil. Imports of this item decreased from 41,117 tons worth 31,883,000 francs in 1962 to 29,990 tons worth 26,649,000 francs in 1963. The imports from the United States on the contrary increased in tonnage although they decreased in value. In 1962 they were 18 tons worth 416,000 francs of fish liver oil (exclusive of cod liver oil) while in 1963 they amounted to 283 tons worth 296,000 francs, of which only five tons were liver oil.

C. Fishmeal. Imports of fish meal decreased from 82,453 tons worth 54,592,000 francs in 1962 to 76,512 tons worth 50,379,000 francs in 1963. There was no U.S. participation in this field.

D. Canned and prepared fish, crustaceans and shell fish. French imports of these items increased from 36,066 tons worth 173,248,000 francs in 1962 to 44,657 tons worth 200,340,000 francs in 1963. The U.S. participation increased also from 83 tons worth 942,000 francs in 1962 to 142 tons worth 1,356,000 francs in 1963.

II. EXPORTS

French exports of fish, crustaceans and shell-fish decreased from 32,868 tons worth 62,700,000 francs in 1962 to 27,154 tons worth 59,440,000 francs in 1963. French exports of these items to the United States decreased from 2,442 tons worth 4,341,000 francs in 1962 to 1,330 tons worth 2,625,000 francs in 1963. French exports of fish oil increased from 2,997 tons worth 3,957,000 francs in 1962 to 3,926 tons worth 5,117,000 francs in 1963. Exports of fish meal also increased from 1,575 tons worth 904,000 francs in 1962 to 1,834 tons worth 1,042,000 francs in 1963. There were no French exports of these items to the United States. Exports of canned and prepared fish, crustaceans and shell-fish decreased from 3,173 tons worth 17,827,000 francs to 2,740 tons worth 16,754,000 francs. Of these, 177 tons worth 1,399,000 francs were sent to the United States, compared with 124 tons worth 1,080,000 francs in 1962.